# DDRS Budget Tool User Guide

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# **Table of Acronyms**

Acronym	Meaning
BDDS	Bureau of Developmental Disabilities Services
DDRS	Division of Disability and Rehabilitative Services
EBT	Electronic Benefit Transfer
HUD	Housing and Urban Development
ISP	Individualized Support Plan
RLA	Residential Living Allowance
SSDI	Social Security Disability Insurance
SSI	Supplemental Security Income

# 1. DDRS Budget Tool

The DDRS Budget tool is an Internet-based application that you can use to view, renew, and complete budgets that have been submitted by the State.

# 1.1 Product Support

If you encounter a problem with this product, or if you have a question or recommendation regarding this user guide, log a <u>HelpBox</u> request. A member of the FSSA Technology Services Team (FTST) will contact you to address the issue.

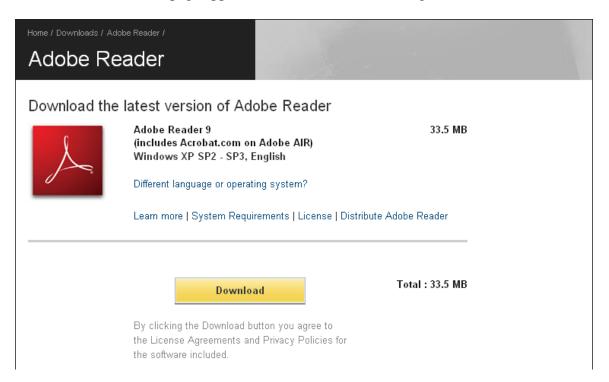
# 1.2 Installing and Testing the Latest Version of Adobe Reader

You can access the most updated copy of this user guide and other documentation from the DDRS website. To view the documents, you must install the Adobe Reader on your computer. Use the following procedure to install and test the latest version of Adobe Reader on your computer (the procedure assumes that you have not installed the Adobe DLM ActiveX control).

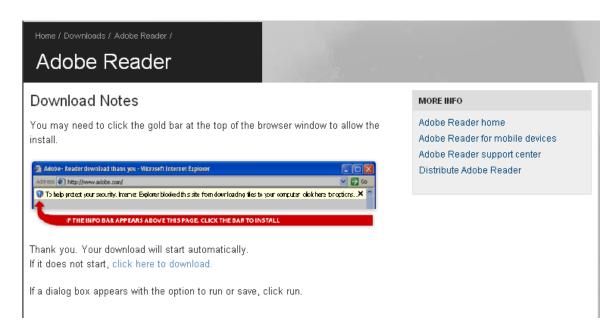
1. Select the following link or enter the URL into the **Address** field of your browser:

http://www.adobe.com/products/acrobat/readstep2.html

The Adobe Reader web page appears, as shown in the following illustration:



2. Select the gold **Download** button. The system displays the following screen and a gold bar appears at the top of your browser window:



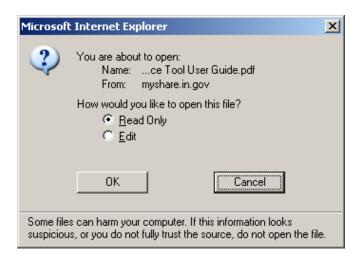
- 3. Select **Click here to install** from the gold bar at the top of the browser window, and then select **Install ActiveX Control** from the shortcut menu that appears.
- 4. Select **Install** in the **Internet Explorer Security Warning** window that appears.
- 5. Wait several seconds as one or more Adobe progress windows appear, indicating the progress of the installation. When the installation is complete, the **getPlus: Info** window appears and indicates that the installation is complete.
- 6. Select **OK** in the **getPlus: Info** window.
- 7. Test the Adobe Reader installation by selecting a PDF file from either the network or a SharePoint site.

#### Tip

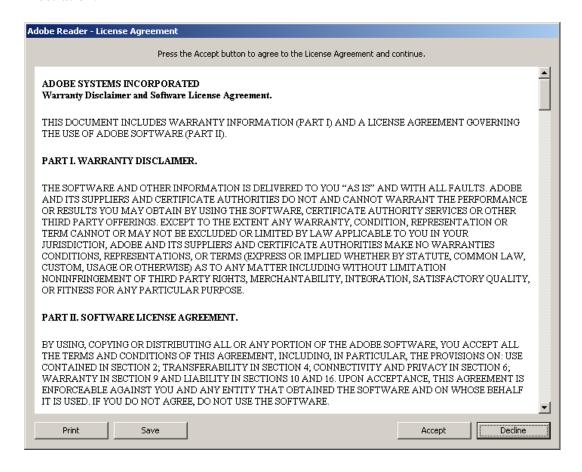
Select the following link to display a SharePoint page that contains multiple PDF files that you can use:

https://myshare.in.gov/FSSA/ddrs/WebBased%20Tools/Forms/AllItems.aspx

8. Ensure that the **Read Only** radio button is selected in the **Microsoft Internet Explorer** window that appears and then select **OK**. The following illustration shows an example of the **Microsoft Internet Explorer** window:



Because this is the first PDF you have opened after installing the Adobe Reader, the **Adobe Reader – License Agreement** window appears, as shown in the following illustration:



9. Select **Accept** to display the PDF file for the document you selected.

The **Adobe Reader – License Agreement** window appears only once. After you perform the remaining steps in this procedure, the license agreement will not appear again when you select a PDF file.

# 2. Website Access and Login Information

You can use the following link to access the DDRS Web-Based Tools page:

https://ddrsprovider.fssa.in.gov/

The DDRS Web-Based Tools page appears. The Web-Based Tools page contains a fixed menu list on the left side. The linked menu items in the menu list change according to the menu that you select.

The following illustration shows the DDRS Web-Based Tools page:



Select **Login** from the menu list to access the system. If this is the first time that you have logged in to the site, the following message might appear:

WARNING! A budget will not be able to be previewed until the following is completed.

In order for this website to function properly, you must add this website as a 'Trusted Site' in your Internet Explorer browser. Please complete the following steps:

1. Click on 'Tools' in the main menu bar
2. Click on 'Internet Options...' in the pull-down list
3. Click on the 'Security tab of the 'Internet Options' window
4. Click on the 'Trusted Sites' icon
5. Click on the 'Stess...' button
6. Make sure the box for 'Require server verification (https:) for all sites in this zone' is NOT checked
7. In the 'Add this Web site to the zone:' textbox, type 'ddrsprovider.fssa.in.gov'
8. Click the 'Add' button; The website name will now appear in the 'Web sites:' box
9. Click the 'OK' button on each of the two windows that are open
10. Click on the refresh icon in Internet Explorer or press the 'F5' key on your keyboard to refresh the web page
11. Click on the 'Return Home' link below these instructions; This will take you to the website Home page where you will need to click the 'Login' link again to go to the Login page
For further information, you can go to the following Microsoft website:
http://www.microsoft.com/windows/je/ie6/using/howto/security/settings.mspx
Return Home

Follow the instructions to properly set your computer to be able to view and use the website. When you complete the instructions, the **Log In** window appears.

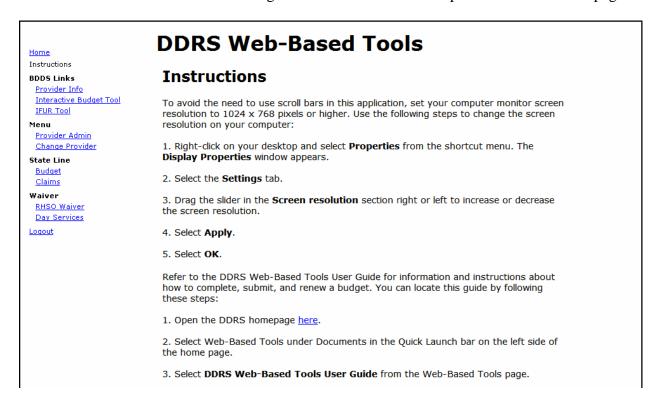
The following illustration shows an example of the **Log In** window:



Complete the information in the **Log In** window and select **Log In**. The Instructions page appears.

# 2.1 Instructions Page

If this is your first time logging in, you should read the instructions and follow the steps to optimize your screen resolution and familiarize yourself with the location of the DDRS Web-Based Tools User Guide. The following illustration shows an example of the Instructions page:



# 3. DDRS Budget Tool

Before you begin, you must ensure that you are viewing and working with budgets for the correct provider. To change to the desired provider:

1. Select **Change Provider** under **Menu** from the menu list. The following fields appear:



- 2. Select the provider from the drop-down list.
- 3. Select Update.

After you have selected the appropriate provider, select **Budget** under **State Line** from the menu list. The Provider Processing screen appears and displays the All Budgets window by default.

The following illustration shows an example of the Provider Processing screen:



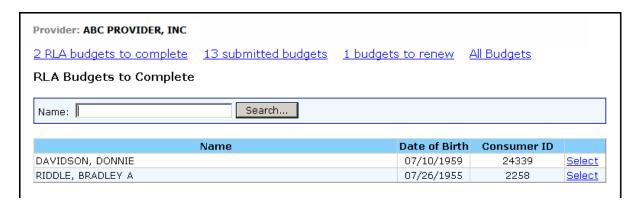
# 3.1 Provider Processing Screen

The Provider Processing screen contains the following links that you use to complete and manage consumer budgets:

RLA budgets to completeSelect this link to choose an RLA budget to complete.submitted budgetsSelect this link to search for a budget that has been submitted for a BDDS Business Operations Specialist to review.budgets to renewSelect this link to search for a budget that is ready for renewal.All BudgetsSelect this link to search for a budget by using compound search parameters.

# 3.2 RLA Budgets to Complete

When you select the **RLA budgets to complete** link on the Provider Processing screen, the **RLA Budgets to Complete** window appears. You use this window to select a consumer that requires an RLA budget. The following illustration shows an example of the **RLA Budgets to Complete** window:



You can search for a consumer by entering a name or portion of a name in the **Name** field and selecting **Search**. The system displays the consumers that match the search criteria. If you leave the **Name** field blank and select **Search**, the system returns all consumers listed in the database.

If multiple pages of matches exist, you can select **Next** > to view the next page. You can also enter more specific information in the **Name** field to refine the search and produce fewer results.

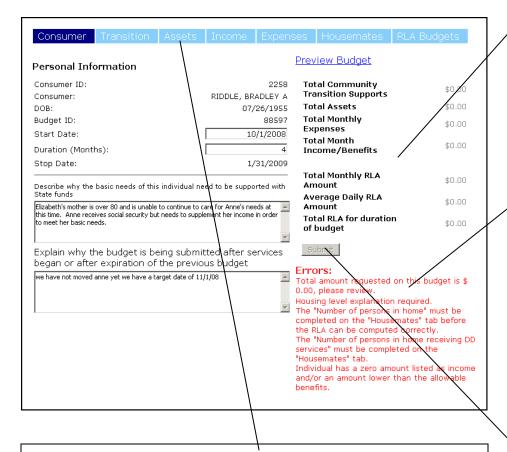
After you locate the consumer's name, select the corresponding **Select** link on the right side of the screen to select the consumer. The first of several RLA budget windows appears.

# 3.3 RLA Budget Windows

The system uses the following tabbed windows to complete an RLA budget for a consumer:

- Personal Information window
- Community Transitions Support window
- Individual's Assets window
- Monthly Income and Benefits window
- Monthly Living Expenses window
- Housemate Information window

The following illustration shows an example of an RLA budget window:



After you complete the information in each window, select the next tab to save the information and display the next window. For example, after you complete the information in the **Personal Information** window, select the **Assets** tab to display the **Individual's Assets** window.

#### Tin

Because the system automatically saves the information in the current tab when you select another tab or exit the system, you can develop a budget over multiple sessions.

The section on the right side of each window contains a fixed display that provides financial summary information. The system populates the read-only fields in this section as you complete the information in the RLA budget windows.

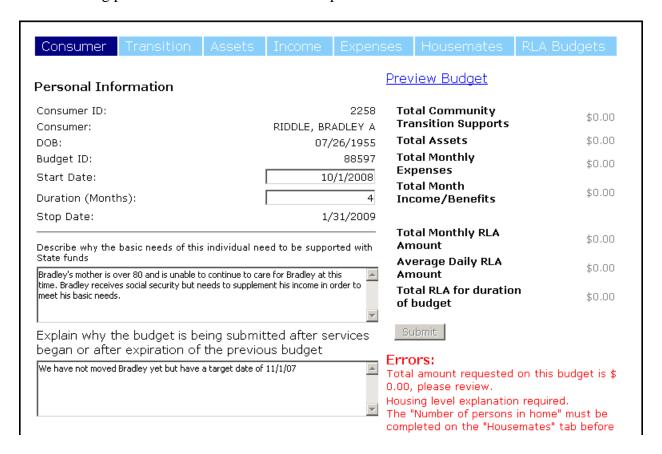
The **Errors** section of the window displays the business requirements that have not been met for the budget. As you complete each window in the budget and satisfy the requirements, the errors gradually disappear from the screen.

When you have entered enough required information, all of the errors will have disappeared and the **Submit** button becomes available, indicating that you can submit the budget for review.

#### 3.3.1 Personal Information Window

Select the **Consumer** tab to display the **Personal Information** window. This window contains preliminary information about the RLA budget and fields that you can use to document basic demographic information about the consumer.

The following partial illustration shows an example of the **Personal Information** window:



The following table describes the fields in the **Personal Information** window:

#### Window Fields

Field	Description
Consumer ID	This read-only field contains the BDDS-assigned identification number for the consumer.
Consumer	This read-only field displays the consumer's name.
DOB	This read-only field displays the consumer's date of birth.

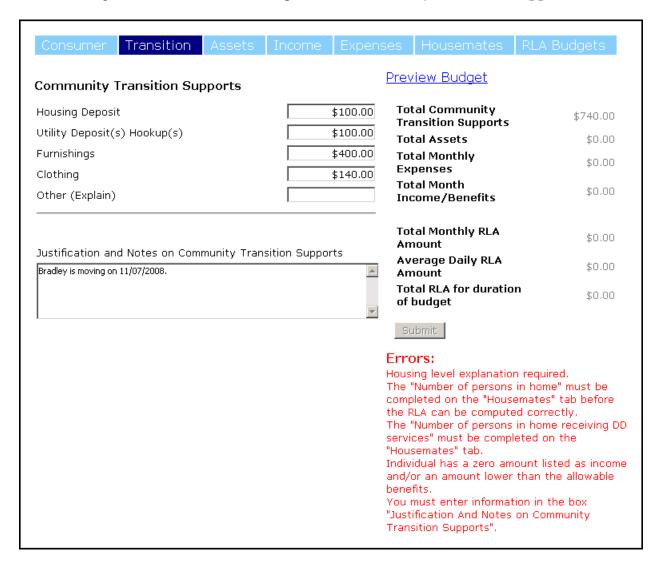
# Window Fields (continued)

Field	Description
<b>Budget ID</b>	This read-only field displays the identification number assigned to the budget.
Start Date	This input field contains the start date for the time period that the budget covers.
<b>Duration (Months)</b>	This input field contains the duration of the time period that the budget covers.
Stop Date	This read-only field displays the stop date for the budget. The system computes the stop date by using the start date and duration information that you enter.
Basic needs declaration	Enter a description of the consumer's basic needs in this text box if the following error appears in the <b>Errors</b> section:  You must enter information in the box "Describe why the basic needs of this individual need to be supported with State funds".
Budget submission declaration	Enter an explanation in this text box if the following error appears in the <b>Errors</b> section:  Budget submitted after services began or after expiration of previous
	budget.

#### 3.3.2 Community Transition Supports Window (Initial Budgets Only)

If a budget is an initial budget, the **Community Transition Supports** window becomes available. Select the **Transition** tab to display the **Community Transition Supports** window.

The following illustration shows an example of the **Community Transition Supports** window:



The following table describes the fields in the **Community Transition Supports** window:

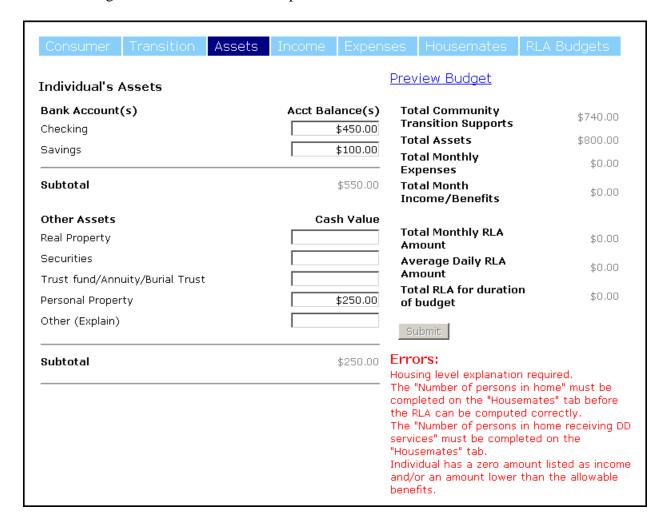
# **Window Fields**

Field	Description
<b>Housing Deposit</b>	This field contains the amount of money that the consumer requires for deposit on their new home.
Utility deposit(s)/ Hook-up(s)	This field contains the amount of money that the consumer requires for deposit towards their utilities.
Furnishings	This field contains the amount of money that the consumer requires for furnishing their new home.
Clothing	This field contains the amount of money that the consumer requires to purchase clothing.
Other (Explain)	This field contains the amount of money required for assistance with items that do not fall into a previous category. If you use this field, you must enter a justification statement in the text box at the bottom of the window.
Justification and Notes on Community Transition Supports	Use this text box to record:  • Justification for other amounts listed in the <b>Other (Explain)</b> field.  • Notes that pertain to the budget or consumer.

#### 3.3.3 Individual's Assets Window

Select the **Assets** tab to display the **Individual's Assets** window. This window contains fields that you can use to document the consumer's assets.

The following illustration shows an example of the **Individual's Assets** window:



The following table describes the fields in the **Individual's Assets** window:

#### Window Fields

Field	Description
Checking	This input field contains the balance in the consumer's checking account.
Savings	This input field contains the balance in the consumer's savings account.

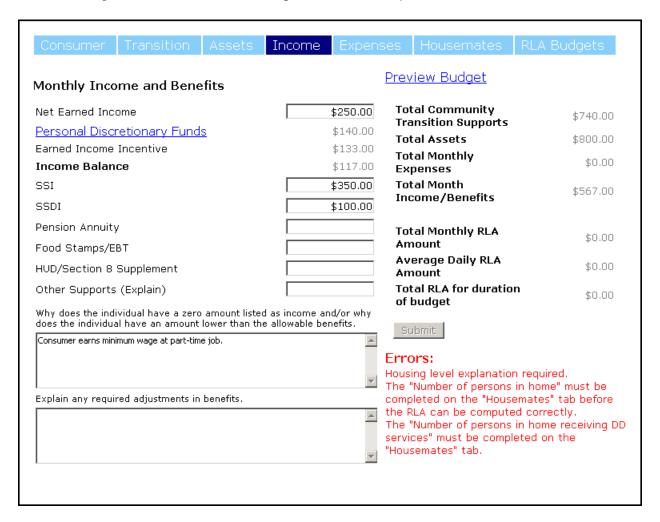
# Window Fields (continued)

Field	Description
Subtotal	This read-only field displays the sum of the consumer's checking and savings account balances.
Real Property	This input field contains the cash value of real property (for example, a house or land) that the consumer owns.
Securities	This input field contains the cash value of securities that the consumer owns.
Trust fund/Annuity/ Burial Trust	This input field contains the cash value of trust funds, annuities, and burial trusts that the consumer owns.
Personal Property	This field contains the cash value of personal property (for example, an automobile and other moveable assets) that the consumer owns.
Other (Explain)	This input field contains the cash value of other assets that the consumer owns that do not fall into a previous category.
Subtotal	This read-only field displays the sum of the cash value of the consumer's assets.

#### 3.3.4 Monthly Income and Benefits Window

The **Monthly Income and Benefits** window contains fields that you can use to document the consumer's monthly income and benefits.

The following illustration shows an example of the **Monthly Income and Benefits** window:



The following table describes the fields in the **Monthly Income and Benefits** window:

#### **Window Fields**

Field	Description
Net Earned Income	This input field contains the net monthly income that the consumer earns from a paying job.  If this field contains a positive value, the <b>Discretionary Funds</b> window automatically appears.

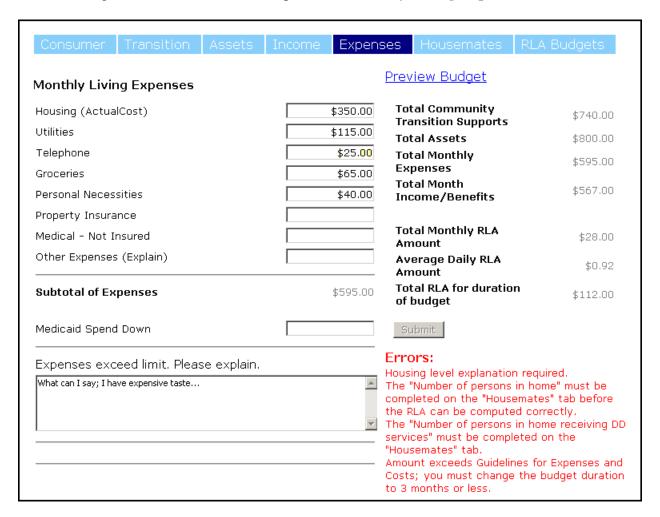
# Window Fields (continued)

Field	Description
Earned Income Incentive	This read-only field displays the calculated value from the <b>Net Earned Income</b> field.
Income Balance	This read-only field displays the difference between the values of the <b>Net Earned Income</b> and <b>Earned Income Incentive</b> fields.
SSI	This input field contains the monthly benefit amount that the consumer receives from one or more SSI programs.
SSDI	This input field contains the monthly benefit amount that the consumer receives from one or more SSDI programs.
Pension Annuity	This input field contains the monthly annuity amount that the consumer receives from a pension.
Food Stamps/EBT	This input field contains the monthly benefit amount that the consumer receives in food stamps or from the EBT program.
HUD/Section 8 Supplement	This field contains the monthly benefit amount that the consumer receives from the HUD or Section 8 programs.
Other Supports (Explain)	This field contains the monthly benefit amount that the consumer receives from other support programs that do not fall into a previous category. If you use this field, you must provide an explanation in the text window at the bottom of the window.
Income amount explanation	Enter an explanation of the consumer's income situation in this text box if the following error appears in the <b>Errors</b> section:
	Individual has a zero amount listed as income and/or an amount lower than the allowable benefits
Required adjustments explanation	(Optional) Enter an explanation of any required adjustments to the consumer's benefits.

#### 3.3.5 Monthly Living Expenses Window

The **Monthly Living Expenses** window contains fields that you can use to document the consumer's monthly living expenses.

The following illustration shows an example of the **Monthly Living Expenses** window:



The following table describes the fields in the **Monthly Living Expenses** window.

#### Window Fields

Field	Description
<b>Housing (Actual Cost)</b>	This field contains actual housing expenses.*
Utilities	This field contains the amount in utilities that the consumer pays each month.*
Telephone	This field contains the amount of monthly telephone service costs.*

# Window Fields (continued)

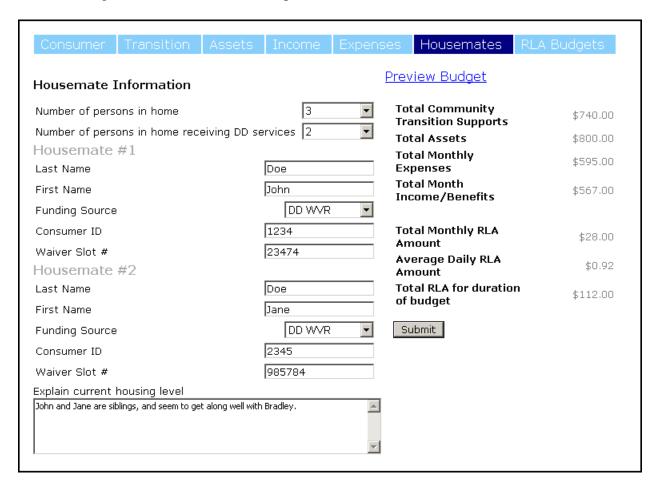
Field	Description
Groceries	This field contains the amount that the consumer spends each month on groceries.*
Personal Necessities	This field contains the amount that the consumer spends each month on personal necessities.*
<b>Property Insurance</b>	This field contains the monthly amount for property insurance.*
Medical – Not Insured	This field contains the amount that the consumer pays each month for uninsured medical costs.*
Other Expenses (Explain)	This field contains the amount that the consumer pays for other expenses that do not fall into a previous category.*
Subtotal of Expenses	This read-only field displays the sum of the amounts from the previous fields.
Medicaid Spend Down	This field contains the monthly amount of Medicaid spend down for which the consumer qualifies.*
Expenses exceed limit explanation	Enter an explanation of why the expenses exceed the limit if one or more of the following errors appear in the Errors section:
	Expenses exceed limit. Explanation required.
	Housing maximum amount is, justification is required.
	Utilities maximum amount is, justification is required.
	Telephone expense maximum amount is, justification is required.

\*For more information about this field, refer to the *BDDS Stateline Service Definitions* document on the BDDS website. If this field contains a value outside of the established guidelines provided in the *BDDS Stateline Service Definitions* document, an explanation of the overage must be entered in the justification box that appears.

#### 3.3.6 Housemate Information Window

The **Housemate Information** window contains fields that you can use to document the consumer's living arrangements.

The following illustration shows an example of the **Housemate Information** window:



The following table describes the fields in the **Monthly Living Expenses** window.

#### **Window Fields**

Field	Description
Number of persons in home	This field contains the total number of people, including the consumer, living in the consumer's home. The value in this field determines the number of Housemate Information field groups that appear. For example, selecting 3 from the drop-down list generates two groups of Housemate Information fields.

# Window Fields (continued)

Field	Description	
Number of persons in home (continued)	Select one of the following valid entries:  • 1 • 2 • 3 • 4	
Number of persons in home receiving DD services	This field contains the number of people in the consumer's home who are receiving DDRS services. The value in this field should be less than the value in the <b>Number of persons in home</b> field.	
	Select one of the following valid entries:  • 1  • 2  • 3	
Housemate Information – the following fields repeat for each additional housemate		
Last Name	This field contains the last name of the housemate.	
First Name	This field contains the first name of the housemate.	
<b>Funding Source</b>	This field contains a code that indicates the source of funds that the housemate receives.	
	Select one of the following valid entries:	
	<ul> <li>A&amp;D WVR</li> <li>AL WVR</li> <li>AUT WVR</li> <li>DD WVR</li> <li>MFC WVR</li> <li>SS WVR</li> <li>TBI WVR</li> </ul>	
Consumer ID	This field contains the BDDS-assigned identification number for the housemate.	
Waiver Slot #	This field contains the waiver slot number assigned to the housemate.	
Housing level explanation	Enter an explanation in this field when the following error appears in the <b>Errors</b> section:	
	Housing level explanation required.	

After you complete the information in the RLA budget windows and have cleared away all errors in the **Errors** section, select the **Submit** button in the financial summary section of the screen. The system saves the RLA budget information and returns to the <u>Provider Processing</u> screen.

# 3.4 Submitted Budgets

Select the **submitted budgets** link on the Provider Processing screen to search for a budget that has been submitted and is ready for review. The **Budgets Submitted for Approval** window appears.

The following illustration shows an example of the **Budgets Submitted for Approval** window:



If multiple pages of matches exist, you can select **Next** > to view the next page.

You can also search for a name by entering a name or portion of a name in the **Name** field and selecting **Search**. The system displays the consumers that match the search criteria.

After you locate the consumer's name, click the corresponding **Review** link on the right side of the screen to select the consumer. The **Review Budget** window appears.

The following illustration shows an example of the **Review Budget** window:



The following table describes the fields and buttons in the **Review Budget** window.

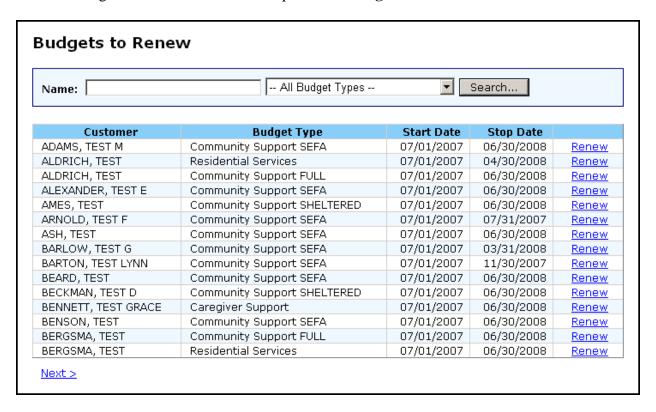
#### **Window Fields and Buttons**

Field or Button	Description
Consumer ID	This read-only field contains the BDDS-assigned identification number for the consumer.
Consumer Name	This read-only field displays the consumer's name.
<b>Budget Type</b>	This read-only field displays the budget type.
Budget ID	This read-only field displays the identification number for the budget.
Start Date	This read-only field displays the budget start date.
Stop Date	This read-only field displays the budget stop date.
Duration	This read-only field displays the duration of the budget, in months.
<b>Budgeted Amount</b>	This read-only field displays the calculated budget amount.
Overage Amount	This read-only field displays the calculated overage amount.
<b>Budget Notes</b>	Use this text box to record notes or comments about the budget or the consumer.
Return button	Select this button to return to the <b>Budgets Submitted for Approval</b> window.

# 3.5 Budgets to Renew

Select the **budgets to renew** link on the <u>Provider Processing screen</u> to search for a budget that is ready for renewal. The **Budgets to Renew** window appears.

The following illustration shows an example of the **Budgets to Renew** window:



You can search for a budget by using the consumer name, the budget type, or both. Use the following steps to search for a budget:

- 1. (Optional) Enter the consumer's name or a portion of a name in the **Name** field.
- 2. (Optional) Select the budget type from the drop-down list.
- 3. Select Search.

The system displays the consumers that match the search criteria. If multiple pages of matches exist, you can select **Next** > to view the next page. You can also enter more specific information in the **Name** field to refine the search and produce fewer results.

After you locate the consumer's name, select the corresponding **Renew** link on the right side of the screen to select the consumer. The **Renew Budget** window appears.

The following illustration shows an example of the **Renew Budget** window:



The following table describes the fields and buttons in the **Renew Budget** window.

#### **Window Fields and Buttons**

Field or Button	Description
Consumer ID	This read-only field contains the BDDS-assigned identification number for the consumer.
Consumer Name	This read-only field displays the consumer's name.
<b>Budget Type</b>	This read-only field displays the budget type.
Budget ID	This read-only field displays the identification number for the budget.
Start Date	This read-only field displays the budget start date.
Stop Date	This read-only field displays the budget stop date.

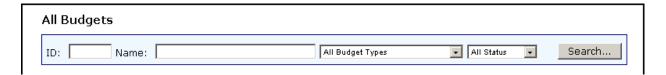
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# Window Fields and Buttons (continued)

Field or Button	Description
Duration	This read-only field displays the duration of the budget, in months.
<b>Budgeted Amount</b>	This read-only field displays the calculated budget amount.
Overage Amount	This read-only field displays the calculated overage amount.
ISP completed for budget	Select this checkbox to indicate that the ISP has been completed for the budget.
	The <b>Submit</b> button is only enabled if this box is checked.
Requires Change	Select this check box if the budget requires one or more changes. If you select this button, you must provide an explanation in the <b>Budget Notes</b> list box below the radio buttons.
Accept as Entered	Select this radio button if the budget is acceptable as it currently appears.
<b>Budget Notes</b>	Use this list box to record notes about the budget (for example, the reason that you selected the <b>Requires Change</b> radio button, or to request additional money).
Submit button	Select this button to transmit the information to the State and return to the <b>Budgets to Renew</b> window.
	You must select the <b>ISP completed for budget</b> checkbox for this button to become available.

# 3.6 All Budgets

Select the **All Budgets** link on the <u>Provider Processing screen</u> to search for a budget by entering multiple search criteria. When you select **All Budgets**, the **All Budgets** window appears, as shown in the following illustration:



The following table describes the fields and buttons in the **All Budgets** window. You can use any combination of the fields to narrow the search results.

#### **Window Fields and Buttons**

Field or Button	Description
ID	Enter the identification number assigned to the consumer to search for a budget by the consumer's ID.
Name	Enter the consumer's LAST name or a portion of a last name to search for a budget by the last name or portion of the last name.
<b>Budget Types</b>	Select a budget type from the drop-down field to search for a budget by the budget type.
Status	Select a budget status from the drop-down field to search for a budget by the status.
Search button	Select this button after you have selected or entered the search parameters.

After you enter the search criteria and select the Search button, the budgets that meet the criteria appear in a grid below the search fields, as shown in the following example:



If no budgets appear in the grid, then no budgets met the criteria you selected, and you should change the criteria.

# **Appendix A: Business Rules and Notes**

Refer to the following business rules and notes for more information about using the DDRS Budget tool.

# Residential Services, Community Support Full, and Nursing Facility Budgets

If a budget requires more money, contact the local BDDS field office to obtain prior approval for the increase. You must provide justification that includes the exact additional dollar amount. Increases should only be requested due to the health and welfare of the consumer. After you receive approval, include the justification in the **Budget Notes** list box.

# **Community Support SEFA and Community Support Sheltered Budgets**

These budgets are fixed amount and additional funds cannot be requested. Review the budget. Verify that the ISP is complete for the budget and select the **ISP Completed for budget** checkbox. The system marks the **Accept as Entered** radio button by default. If you agree that the consumer should receive the budget, select the **Submit** button to automatically activate the budget in the system.

# **Caregiver Support Budgets**

These budgets are fixed amount and additional funds cannot be requested. Review the budget. Select the **I will serve this individual** checkbox. The system marks the **Accept as Entered** radio button by default. If you agree that the consumer should receive the budget, select the **Submit** button to automatically activate the budget in the system.

# Treatment Placement, Emergency, Residential Living Allowance Budgets

Review the budget. Verify that the ISP is complete for the budget and select the **ISP Completed for budget** checkbox. The system marks the **Accept as Entered** radio button by default. If you agree that the consumer should receive the budget, select the **Submit** button to automatically activate the budget in the system.